

OCTOBER 2021

- MATTRESSES VOL 22

Audience: 1,250+ US Consumers Balanced to Census

CHECK BREAKDOWN:

PURCHASE ACTIVITY: POSITIVE

The percentage of consumers who purchased a mattress within the last three months is tracking flat q/q.

CATALYSTS

The feel/comfort and price of the mattress are the top two most important factors for consumers, but the online channel/convenience have been growing in importance over time.

MEMORY FOAM

Memory foam mattresses continue to hold the lead over inner-spring mattresses. Hybrid has gained q/q but still trails both memory foam and innerspring.

ONLINE MATTRESSES

Online purchase's share has been holding relatively flat in the last couple of quarters. Online has grown in popularity over time and feedback toward buying online remains positive. Likelihood of purchasing their next mattress online has grown both q/q and since survey inception.

COMPETITIVE DYNAMICS

Future purchases intentions are positive for Purple. Tempur-Pedic, Mattress Firm, and Serta are ahead of Purple when it comes to future purchase intentions.

MATTRESSES PURCHASE ACTIVITY

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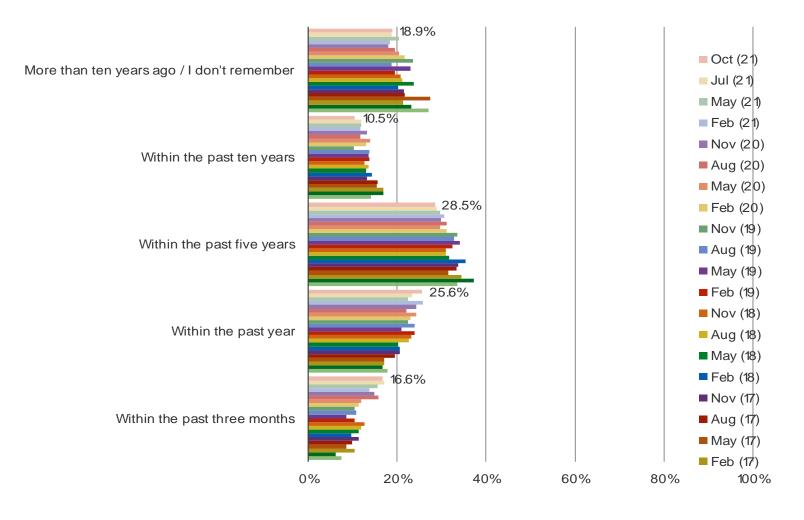
BESPOKE MARKET INTELLIGENCE

To The Mattresses

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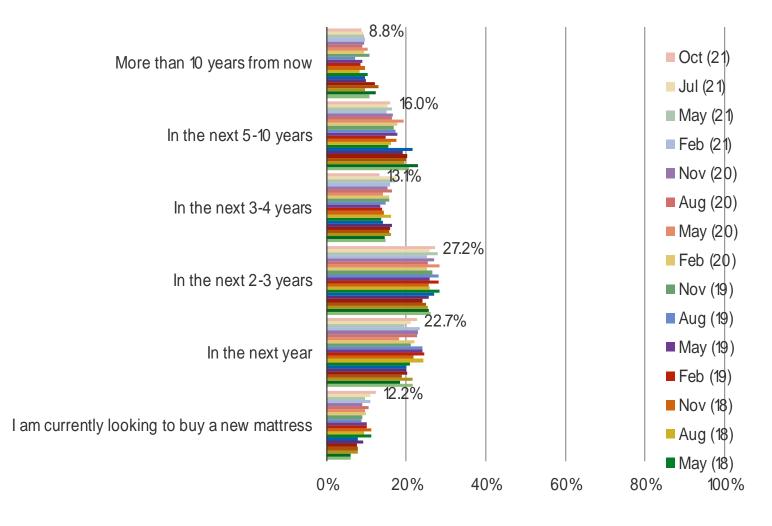
Audience: 1,250 US Consumers Date: October 2021

LAST TIME PURCHASED A MATTRESS



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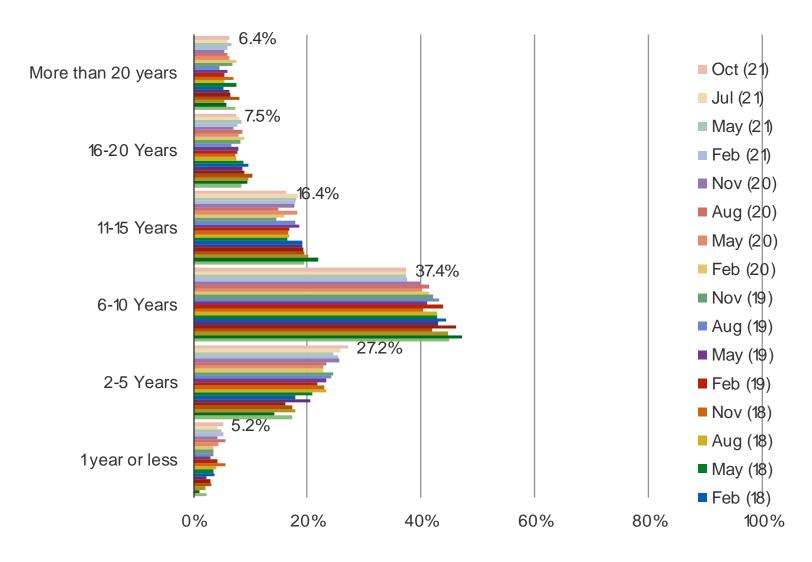
WHEN DO YOU EXPECT TO GET A NEW MATTRESS?



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HOW LONG DO YOU BELIEVE MATTRESSES SHOULD LAST?

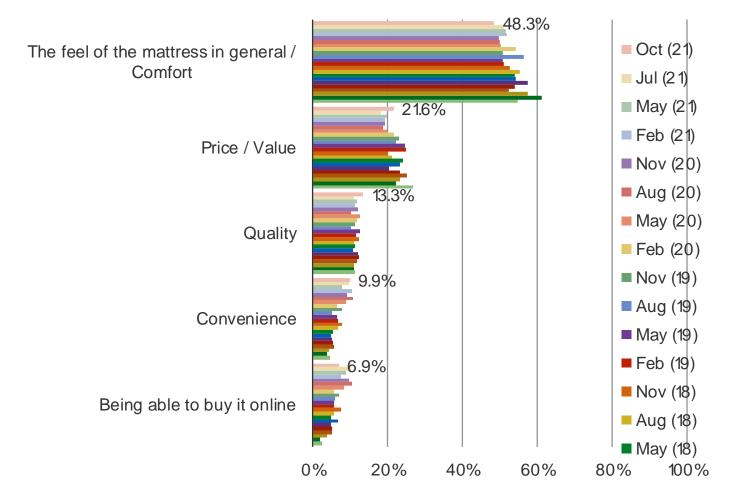


CATALYSTS / DECISION DRIVERS

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WHICH OF THE FOLLOWING WOULD MATTER MOST TO YOU IF YOU WERE SHOPPING FOR A MATTRESS?



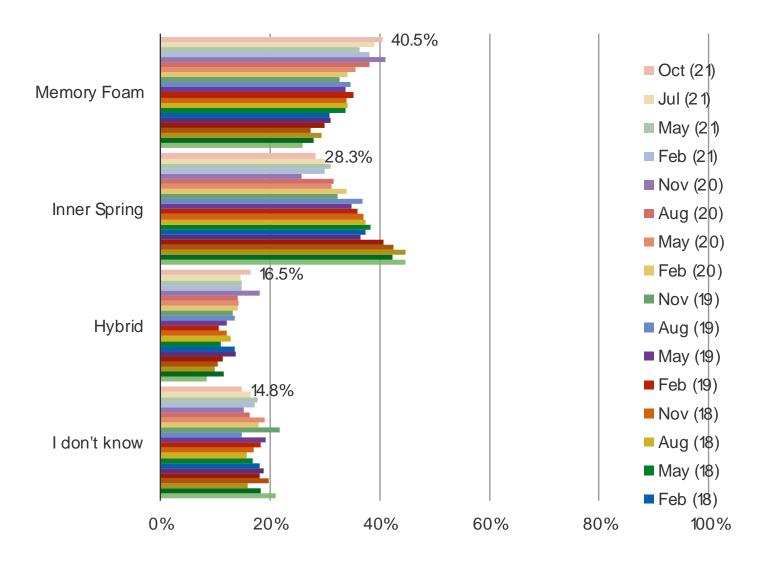
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MEMORY FOAM VS. INNER SPRING

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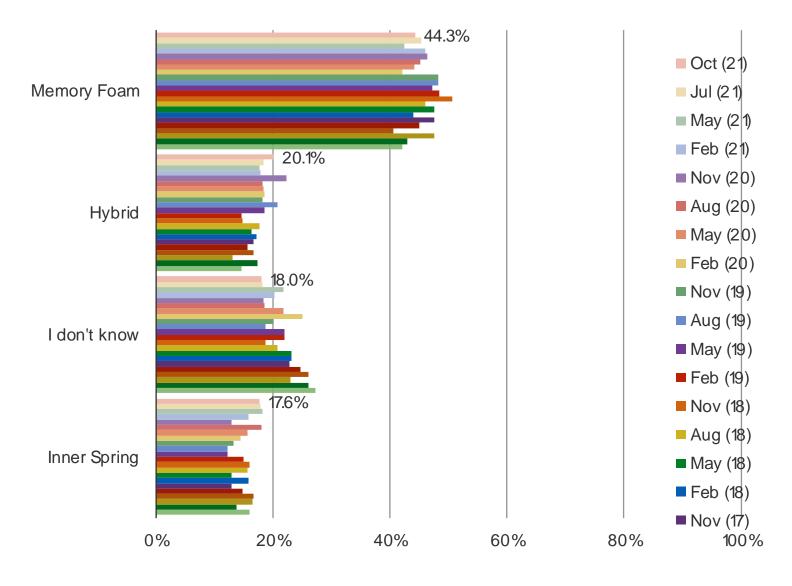
WHICH BEST DESCRIBES THE TYPE OF MATTRESS THAT YOU CURRENTLY SLEEP ON?



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IF YOU WERE BUYING A MATTRESS TODAY, WHICH WOULD YOU BE MOST LIKELY TO PURCHASE?



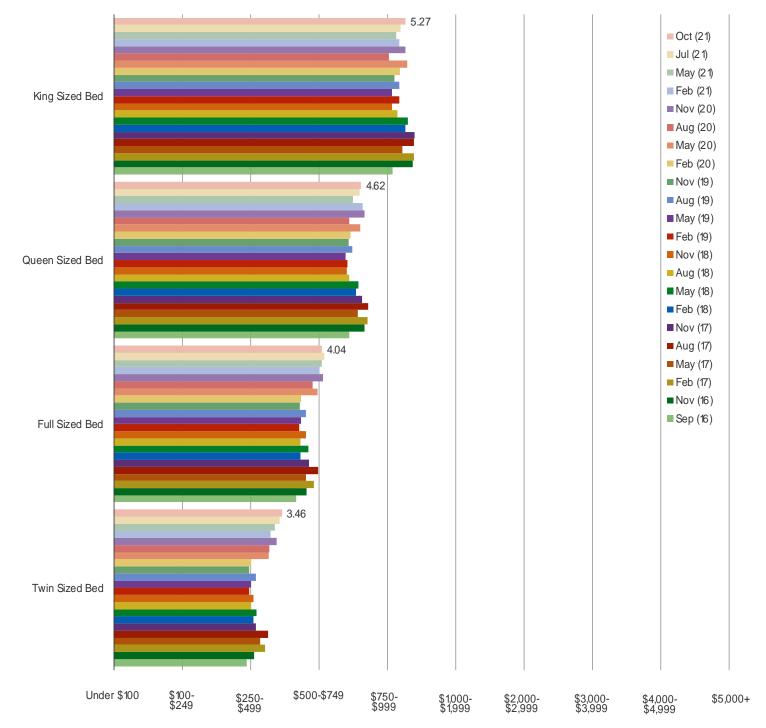
PRICE EXPECTATIONS

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EXPECTATIONS FOR SPENDING ON MATTRESSES BY SIZE



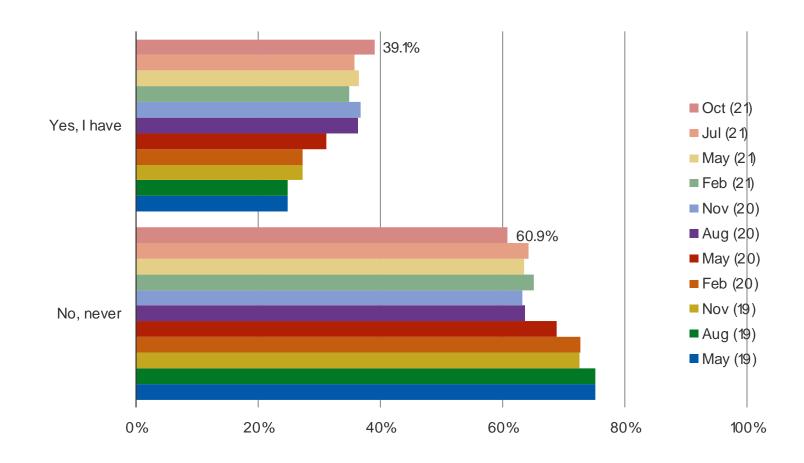
IN-STORE VS. ONLINE

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HAVE YOU EVER ORDERED A MATTRESS ONLINE? (IE. A BED-IN-A-BOX MATTRESS)

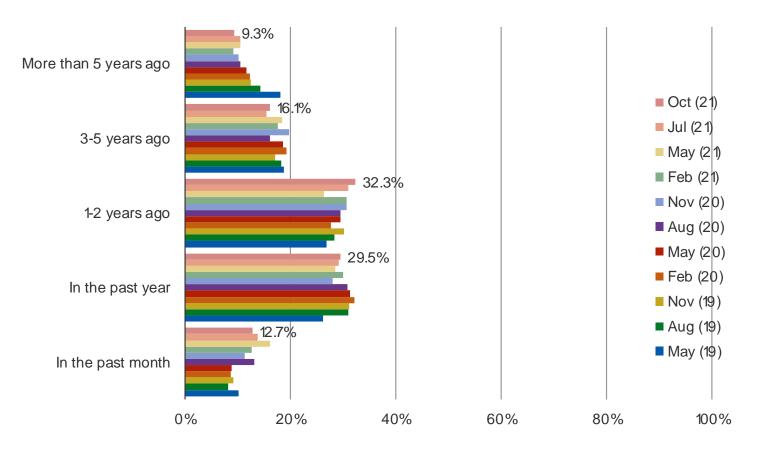


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WHEN DID YOU MAKE YOUR MOST RECENT BED-IN-A-BOX ONLINE MATTRESS PURCHASE?

Posed to respondents who have ordered a mattress online



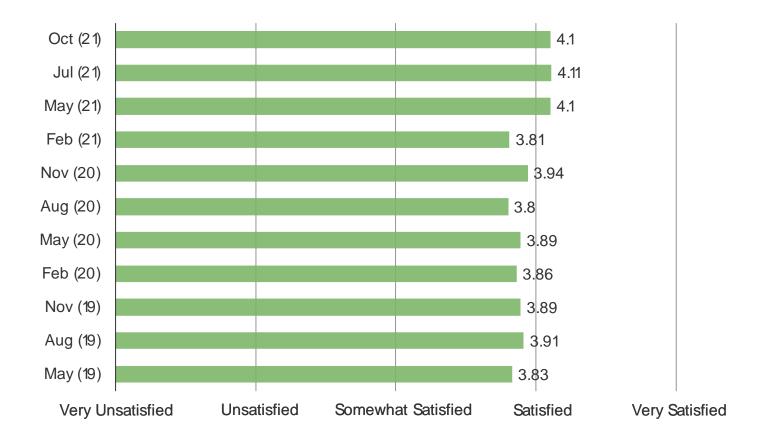
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HOW SATISFIED ARE YOU WITH YOUR BED-IN-A-BOX MATTRESS?

Posed to respondents who have ordered a mattress online



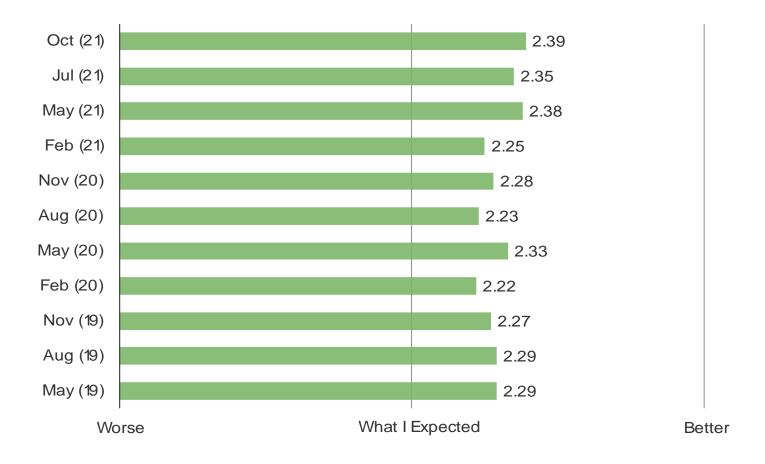
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HOW IS THE MATTRESS HOLDING UP OVER TIME COMPARED TO YOUR EXPECTATIONS?

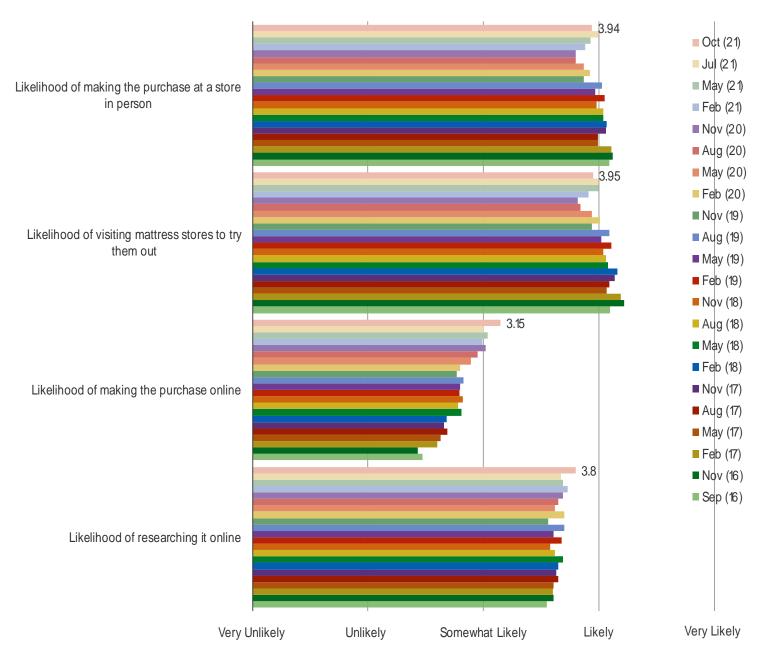
Posed to respondents who have ordered a mattress online



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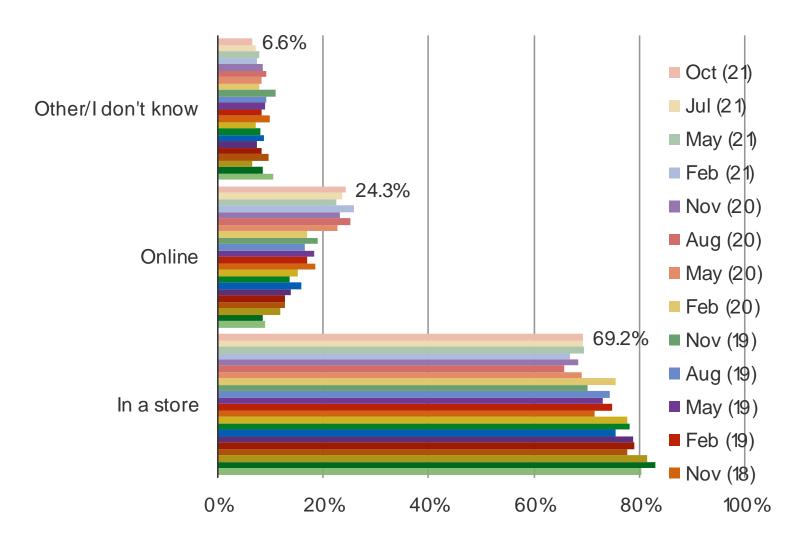
IF YOU NEEDED TO BUY A MATTRESS, HOW LIKELY WOULD YOU BE TO ...



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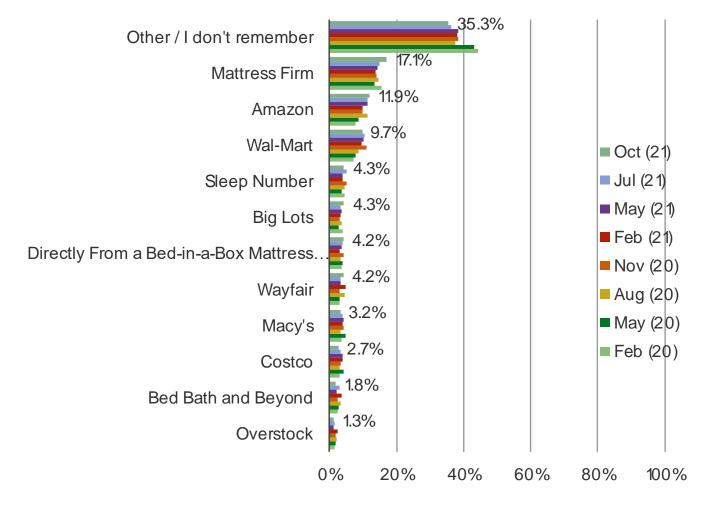
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HOW DID YOU PURCHASE THE MOST RECENT MATTRESS THAT YOU BOUGHT?



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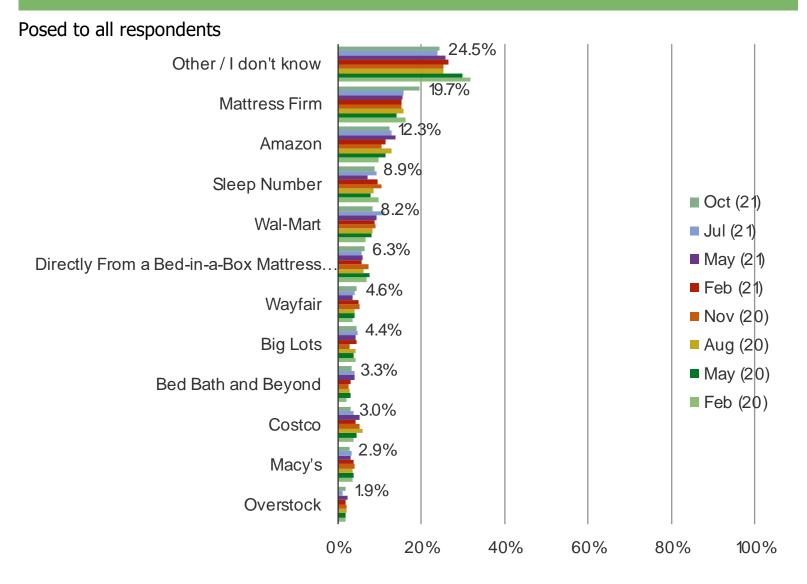
FROM WHICH STORE/WEBSITE DID YOU MAKE YOUR MOST RECENT MATTRESS PURCHASE?



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IF YOU HAD TO BUY A MATTRESS TODAY, WHERE WOULD YOU BE MOST LIKELY TO BUY THEM FROM?



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50.2%

IF YOU NEEDED TO BUY A MATTRESS TODAY, HOW WOULD YOU BEGIN YOUR SEARCH?

Posed to all respondents

54.0% 53.6% I would find a retailer that sells different 52.5% mattress brands, and would then evaluate 51.1% them and choose one Oct (21) 51.8% Jul (21) 54.0% May (21) 52.7% Feb (21) 49.8% Nov (20) 46.1% Aug (20) 46.4% I would research which brand I wanted to May (20) buy, and then find a retailer I could buy it 47.5% Feb (20) from or would buy it directly from the 48.9% brand 48.2% 46.0% 47.3%

0%

20%

40%

60%

80%

100%

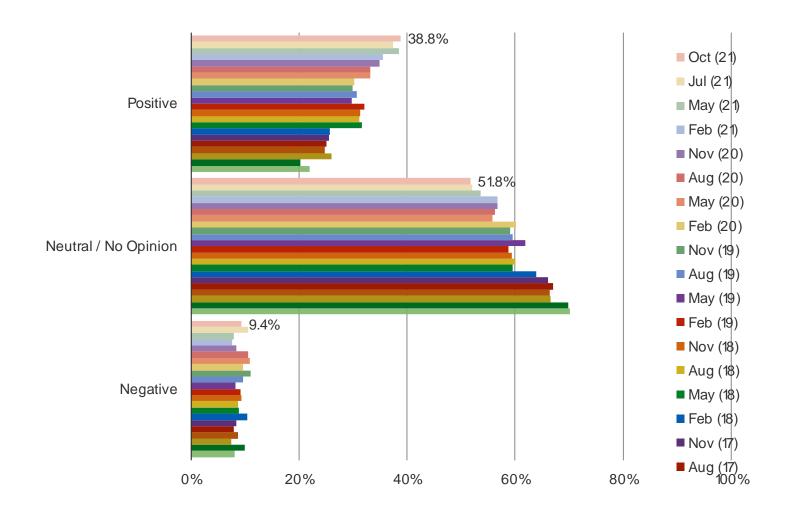
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OPINION OF BED IN A BOX MATTRESS PROVIDERS WHO SHIP MATTRESSES TO CUSTOMERS IN A VACUUM SEALED BOX



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PREFERRED METHOD FOR MATTRESS SHOPPING

Posed to all respondents



Much Prefer In-Stores

Prefer In-Stores

No Preference

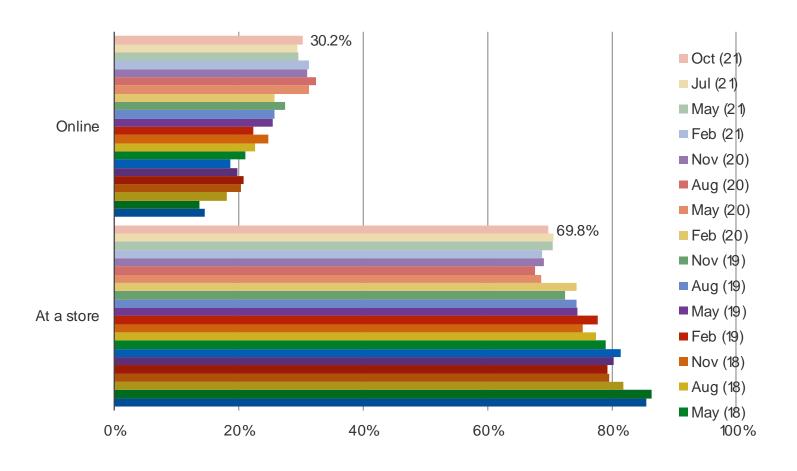
Prefer Online

Much Prefer Online

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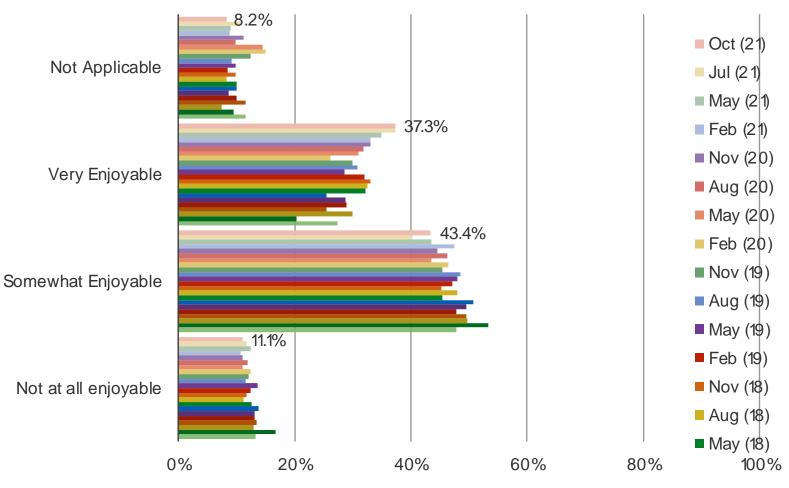
WHEN IT IS TIME TO GET A NEW MATTRESS, DO YOU THINK YOU WILL BUY IT AT A STORE OR ONLINE?



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HOW ENJOYABLE DID YOU FIND THE MATTRESS BUYING PROCESS?



COMPETITIVE DYNAMICS

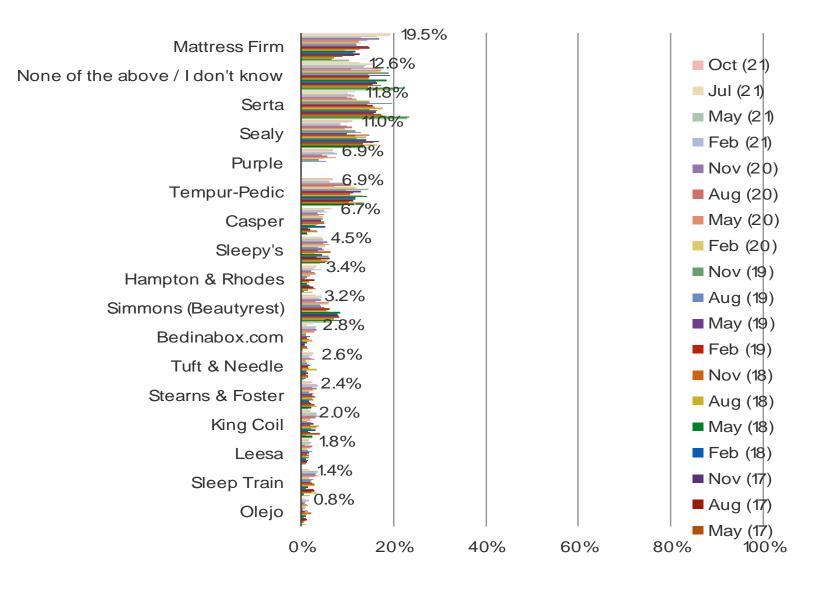
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WHICH BRAND DID YOU PURCHASE?

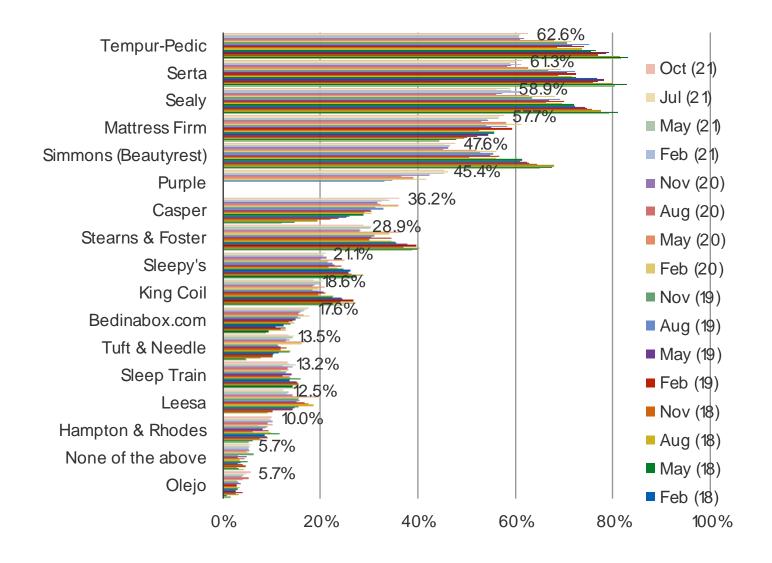
Posed to respondents who purchased a mattress in the past year.



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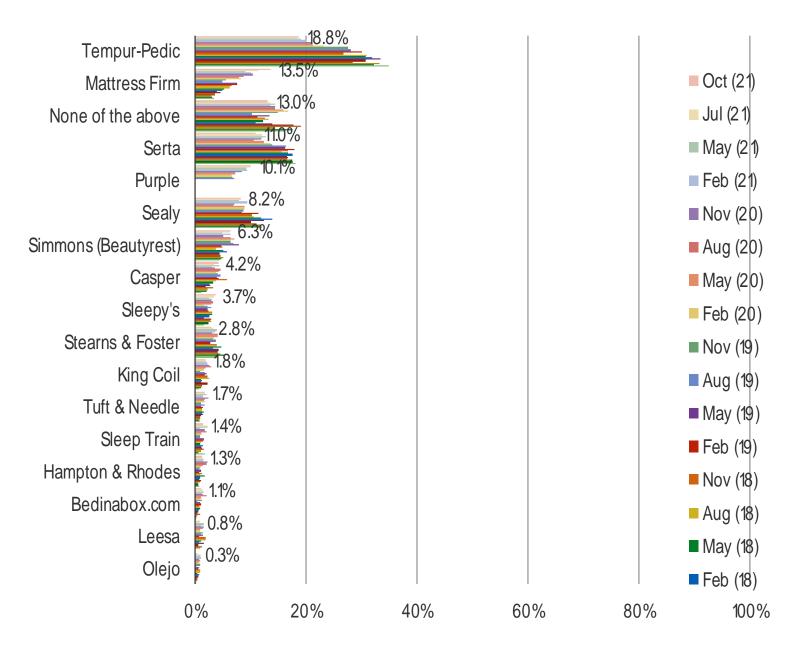
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AWARENESS



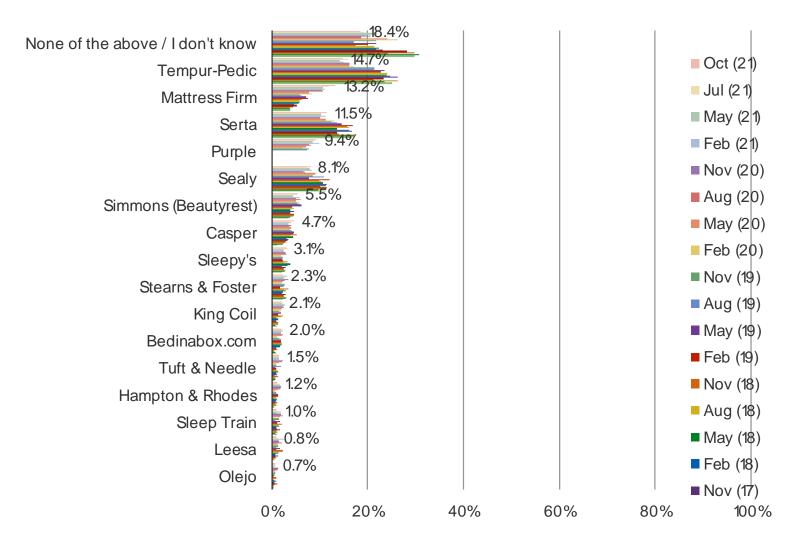
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WHICH OF THE FOLLOWING MATTRESSES DO YOU THINK IS BEST?



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IF YOU WERE BUYING A MATTRESS TODAY, WHICH WOULD YOU BE MOST LIKELY TO BUY?



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FROM PREVIOUS PAGE, WHY DID YOU SELECT THAT BRAND?

